

Bond Michelle D

From: Corbin Kenneth C
Sent: Monday, May 13, 2019 12:03 PM
To: 'Tim Hugo'
Subject: Free File

Hi Tim,

Numerous members of Congress have written to Commissioner Rettig to express concern about various aspects of the Free File program. To build on the positive steps taken this past fall, the IRS and FFI need to outline a path forward that better safeguards taxpayers and better enhances awareness of Free File in general.

Thank you for agreeing to dedicate the necessary time to this topic during the meeting between the IRS and FFI on May 20 and your letter to the IRS last week. Jim Clifford, the Director of our Customer Account Services organization will attend as my representative. To ensure that time is as productive as possible, I wanted to encourage you and your members to think about concrete steps that can address the issues raised by the article. We have informed members of Congress that we are conducting a review of the Free File Memorandum of Understanding and will provide them with the results within 30 days. In the review to Congress, we will make note of the May 20 work session to help move the program to a better place. The IRS has long been supportive of the public-private sector partnership embodied by Free File Inc., and we look forward to continuing our collaborative efforts to improve the IRS.gov/Free File program.

Thanks in advance.

Internal Revenue Service | Office Number (470) 639-3500 | Fax Number 855-863-8342

Bond Michelle D

From: Tim Hugo <tim.hugo@capnet.org>
Sent: Thursday, May 09, 2019 10:16 PM
To: Corbin Kenneth C; Lemons Terry L
Cc: Fox Diane - ATSC
Subject: FFA: Letter to Commissioner Rettig Regarding the Free File Program
Attachments: May 9, 2019 FFA Letter to Commissioner Rettig.pdf

Ken and Terry,

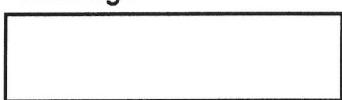
Attached is a letter to Commissioner Rettig that FFA respectively requests be forwarded to him regarding the Free File Program.

Thank you for forwarding this letter to the Commissioner and his office.

Regards,

Tim Hugo
Executive Director
Free File Alliance

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TimHugo



(b)(6)



Transmitted Via Email

May 9, 2019

The Honorable Charles P. Rettig
Commissioner
Internal Revenue Service
1111 Constitution Avenue, NW
Washington, DC 20224

Dear Commissioner Rettig:

On behalf of Free File, Inc., I am writing to you today to express my strong agreement with the Chairman and Ranking Member of the Ways and Means Committee, as well as the Chairman and Ranking Member of the Ways and Means Subcommittee on Oversight, that the IRS conduct a review of the IRS Free File Program and broaden its review to examine the marketing of the Program, its oversight, and additional opportunities to increase participation in the Program.

Free File, Inc., will be pleased to provide you and your staff with information and data that provides an accurate assessment of the Program, and reflects its benefits to taxpayers year over year. As IRS's partner in the Free File Program for the past 17 years, Free File, Inc., and its members are proud of the fact that we have helped prepare and electronically file more than 55 million free federal income tax returns since the Program's inception, saving those low and middle-income taxpayers who are eligible under the Program an estimated \$1.6 billion in tax preparation and filing fees. In addition, Free File members have provided millions of free state tax returns, as well.

While we should and must explore opportunities for increasing participation in the Free File Program, it must be noted that over the last two tax seasons (2018-19) the Program usage has grown by 11 percent.

Unfortunately, many of the recent allegations about Free File member companies are inaccurate, baseless or taken out of context to portray the Program and Free File members in the worst possible light. Free File, Inc., cannot answer for each member company, but we can answer for the Alliance and the Program. We look forward to a sober, probative examination of the Program and how it might be improved and strengthened for the future.

Sincerely,

Tim Hugo
Executive Director, Free File, Inc.

cc: The Honorable Richard E. Neal, Chairman, Committee on Ways and Means
The Honorable Kevin Brady, Ranking Member, Committee on Ways and Means
The Honorable John Lewis, Chairman, Subcommittee on Oversight
The Honorable Mike Kelly, Ranking Member, Subcommittee on Oversight
Stephen M. Ryan, General Counsel, Free File

7137 Main Street, Suite B Clifton, Virginia 20124
Telephone: 703-815-1201

Bond Michelle D

From: Lemons Terry L
Sent: Friday, May 10, 2019 6:58 PM
To: Tim Hugo; Corbin Kenneth C
Cc: Fox Diane - ATSC
Subject: RE: FFA: Letter to Commissioner Rettig Regarding the Free File Program

Tim - FYI, we have shared with the Commissioner. Thanks!

From: Tim Hugo <tim.hugo@capnet.org>
Date: Thursday, May 09, 2019, 10:16 PM
To: Corbin Kenneth C <Kenneth.C.Corbin@irs.gov>, Lemons Terry L <Terry.L.Lemons@irs.gov>
Cc: Fox Diane - ATSC <Diane.L.Fox@irs.gov>
Subject: FFA: Letter to Commissioner Rettig Regarding the Free File Program

Ken and Terry,

Attached is a letter to Commissioner Rettig that FFA respectively requests be forwarded to him regarding the Free File Program.

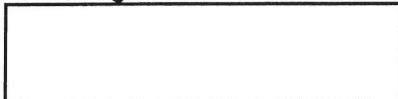
Thank you for forwarding this letter to the Commissioner and his office.

Regards,

Tim Hugo
Executive Director
Free File Alliance

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TimHugo



(b)(6)

Bond Michelle D

From: Tim Hugo <tim.hugo@capnet.org>
Sent: Friday, May 10, 2019 8:02 PM
To: Lemons Terry L
Cc: Corbin Kenneth C; Fox Diane - ATSC
Subject: Re: FFA: Letter to Commissioner Rettig Regarding the Free File Program

Terry,

Thank you to you, Ken, and all of the outstanding professionals at the IRS.

The FFA looks forward to working with you in the coming weeks to answer these media questions.

Tim Hugo

FFA

On Fri, May 10, 2019, 6:57 PM Lemons Terry L <Terry.L.Lemons@irs.gov> wrote:

Tim - FYI, we have shared with the Commissioner. Thanks!

From: Tim Hugo <tim.hugo@capnet.org>
Date: Thursday, May 09, 2019, 10:16 PM
To: Corbin Kenneth C <Kenneth.C.Corbin@irs.gov>, Lemons Terry L <Terry.L.Lemons@irs.gov>
Cc: Fox Diane - ATSC <Diane.L.Fox@irs.gov>
Subject: FFA: Letter to Commissioner Rettig Regarding the Free File Program

Ken and Terry,

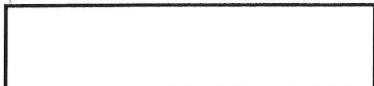
Attached is a letter to Commissioner Rettig that FFA respectfully requests be forwarded to him regarding the Free File Program.

Thank you for forwarding this letter to the Commissioner and his office.

Regards,

Tim Hugo
Executive Director
Free File Alliance

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TimHugo



(b)(6)

Bond Michelle D

From: Corbin Kenneth C
Sent: Monday, April 22, 2019 4:14 PM
To: 'Tim Hugo'
Subject: Free File Numbers

Hi Tim- Just wanted to follow up and we are good with FF using the numbers. Let me know if you need anything from IRS.

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Bond Michelle D

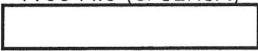
From: Corbin Kenneth C
Sent: Friday, April 19, 2019 6:47 AM
To: Tim Hugo
Subject: RE: Free File: Call please

Will do. I will buzz you this morning.

Internal Revenue Service | Office Number (470) 639-3500| Fax Number 855-863-8342

From: Tim Hugo <tim.hugo@capnet.org>
Date: Thursday, Apr 18, 2019, 3:33 PM
To: Corbin Kenneth C <Kenneth.C.Corbin@irs.gov>
Subject: Free File: Call please

Ken,
Can you give me a quick call about Free File.
Important....but brief.
Thanks,
Tim Hugo
Executive Director
Free File (& CERCA)



(b)(6)

Bond Michelle D

From: Google Calendar <calendar-notification@google.com> on behalf of tim.hugo@capnet.org
Sent: Wednesday, October 17, 2018 11:02 PM
To: Corbin Kenneth C
Subject: Accepted: FFA Offered Improvements 2019 @ Thu Oct 18, 2018 3pm - 4pm (EDT) (Corbin Kenneth C)
Attachments: invite.ics

tim.hugo@capnet.org has accepted this invitation.

FFA Offered Improvements 2019

When Thu Oct 18, 2018 3pm – 4pm Eastern Time - New York

Where ATL. Conf. Rm. 3151 [REDACTED]

(b)(7)(E)

Calendar Corbin Kenneth C

Who

- Corbin Kenneth C - organizer
- tim.hugo@capnet.org - creator
- Fox Diane - ATSC
- Alito David P
- Clifford James P
- sryan@mwe.com
- Rueter Curtis W
- dransom@mwe.com

10/16/2018 Celena Major (470) 639-3453

Invitation from [Google Calendar](#)

You are receiving this courtesy email at the account kenneth.c.corbin@irs.gov because you are an attendee of this event.

To stop receiving future updates for this event, decline this event. Alternatively you can sign up for a Google account at <https://www.google.com/calendar/> and control your notification settings for your entire calendar.

Forwarding this invitation could allow any recipient to modify your RSVP response. [Learn More](#).

Bond Michelle D

From: Corbin Kenneth C
Sent: Tuesday, October 16, 2018 12:25 PM
To: Ryan, Stephen
Cc: Tim Hugo; Fox Diane - ATSC; Ransom, David
Subject: RE: Reiterating FF Meeting Request

We will set up the call. I actually wrote a note to the SP team last week about finding some opportunities for pilots to help inform improvements to FF before we start working the new agreement. This is very timely.

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From: Ryan, Stephen
Sent: Tuesday, October 16, 2018 12:22 PM
To: Corbin Kenneth C
Cc: Tim Hugo ; Fox Diane - ATSC ; Ransom, David
Subject: Reiterating FF Meeting Request

Ken,

Because of the importance of this issue and the time urgency to make changes that will benefit taxpayers in the Jan. 2019 tax season we respectfully reiterate Tim's earlier request for a phone call this week. I have not darkened your door in 2018 and need your and Diane's attention to this opportunity.

Steve Ryan

Sent from my iPhone

Begin forwarded message:

From: Tim Hugo <tim.hugo@capnet.org>
Date: October 16, 2018 at 10:29:30 EDT
To: Diane Fox <diane.l.fox@irs.gov>
Cc: Steve Ryan <sryan@mwe.com>, Vickie Hull <vickie.hull@timhugo.com>
Subject: FFA: Meeting Request

Diane,

First, thank you for your leadership at the IRS and for all of your endeavors to engage with industry. Working together, our partnership will continue to produce successful outcomes for the American Taxpayers.

In our efforts to continue to improve the service that the Free File Alliance provides to low and moderate income Americans, our members have drafted a series of changes to our joint MOU. The genesis of these changes are directly derivative from your suggested improvements to the program. So as to implement these changes for the coming tax season, Steve and I would like to officially request a meeting with you and Ken. We could do a conference call or because of the urgent nature of this issue, we could meet in Atlanta.

Best,

Tim Hugo

Page: 2

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Please visit <http://www.mwe.com/> for more information about our Firm.

Bond Michelle D

From: Ryan, Stephen <SRyan@mwe.com>
Sent: Tuesday, October 16, 2018 1:29 PM
To: Corbin Kenneth C
Cc: Tim Hugo; Fox Diane - ATSC; Ransom, David
Subject: Re: Reiterating FF Meeting Request

Thanks Ken and Diane.

Sent from my iPhone

On Oct 16, 2018, at 12:24, Corbin Kenneth C <Kenneth.C.Corbin@irs.gov> wrote:

We will set up the call. I actually wrote a note to the SP team last week about finding some opportunities for pilots to help inform improvements to FF before we start working the new agreement. This is very timely.

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From: Ryan, Stephen <SRyan@mwe.com>
Sent: Tuesday, October 16, 2018 12:22 PM
To: Corbin Kenneth C <Kenneth.C.Corbin@irs.gov>
Cc: Tim Hugo <Tim.Hugo@capnet.org>; Fox Diane - ATSC <Diane.L.Fox@irs.gov>; Ransom, David <Dransom@mwe.com>
Subject: Reiterating FF Meeting Request

Ken,

Because of the importance of this issue and the time urgency to make changes that will benefit taxpayers in the Jan. 2019 tax season we respectfully reiterate Tim's earlier request for a phone call this week. I have not darkened your door in 2018 and need your and Diane's attention to this opportunity.

Steve Ryan

Sent from my iPhone

Begin forwarded message:

From: Tim Hugo <tim.hugo@capnet.org>
Date: October 16, 2018 at 10:29:30 EDT
To: Diane Fox <diane.l.fox@irs.gov>
Cc: Steve Ryan <sryan@mwe.com>, Vickie Hull <vickie.hull@timhugo.com>
Subject: FFA: Meeting Request

Diane,

First, thank you for your leadership at the IRS and for all of your endeavors to engage with industry. Working together, our partnership will continue to produce successful outcomes for the American Taxpayers.

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Page: 2

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Best,
Tim Hugo

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Please visit <http://www.mwe.com/> for more information about our Firm.

Bond Michelle D

From: Corbin Kenneth C
Sent: Friday, August 24, 2018 7:31 AM
To: McKay, Bernie; Lemons Terry L
Subject: RE: Some Intuit news today

Thank you for sharing Bernie. Please let Brad know, that we are grateful and appreciate his years of service, collaboration and partnership with us here at the IRS. My interactions with Brad, during the Security Summit, demonstrated a commitment and energy that made our partnership a huge success. Knowing that he will continue as the Executive Chairman, means that this is not good bye, but a new opportunity for us to find innovative ways to help build a stronger tax ecosystem.

I look forward to working with Sasan as well and hope to see each other in person soon. Please extend our congratulations.

Thanks as always Bernie, talk soon.

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From: McKay, Bernie [mailto:Bernie_McKay@intuit.com]
Sent: Thursday, August 23, 2018 6:05 PM
To: Corbin Kenneth C ; Lemons Terry L
Subject: Some Intuit news today

Hi Ken and Terry,

I wanted to share some news that we announced today. We shared succession plans for our CEO Brad Smith. After 10 years as CEO, Brad has decided to step down on Jan. 1 and will become the Executive Chairman of Intuit's board of directors. This has been something Brad has planned for some time with a very thoughtful multi-year succession plan.

Sasan Goodarzi, who currently leads Intuit's Small Business and Self-Employed Group, has been named Intuit's next CEO. Sasan has led each of our major businesses, including both our Consumer and Professional tax software business units, and previously served as well as our CIO, so he has great Intuit experience. You can read more in today's [press release](#).

I wanted to share this news with you both personally. Brad has been an amazing leader and we are thankful that he will serve on as our Executive Chairman. We are also excited for Sasan and will look forward to his engagement going forward. Intuit is as deeply committed going forward as we have been in the past to our Summit, ISAC and Free File public-private partnerships with the IRS and look forward to the future.

Please let me know if you have any questions!

Best regards,

Bernie

Bond Michelle D

From: Corbin Kenneth C
Sent: Friday, July 20, 2018 10:59 AM
To: tim.hugo@capnet.org
Cc: Evans Liz E; Lemons Terry L
Subject: FW: Free File Follow Up

Sorry Tim, got your email address typed wrong.

Internal Revenue Service | Office Number (470) 639-3500 | Fax Number 855-863-8342

From: Corbin Kenneth C
Sent: Friday, July 20, 2018 10:58 AM
To: Ryan, Stephen ; 'Hugo@capnet.org'
Cc: Lemons Terry L ; Evans Liz E
Subject: Free File Follow Up

Good morning Tim and Steve,

As you are aware, there have been some opinion articles published recently by the IRSAC chair, Dennis Ventry. These opinion pieces about the Free File program reflected what we believe is Mr. Ventry's opinion and not that of the IRSAC, which is preparing recommendations to IRS on ways to improve the Free File program in the future.

The IRSAC has a regularly scheduled working group session in Washington D.C. next week. While the IRSAC has had the opportunity to engage with the IRS about the Free File program in prior working sessions, we believe it would be beneficial for them to hear from you. We would like to invite you to attend the session on Wednesday, July 25 at 11:15 for one hour at our 1111 office, in the Commissioner's Conference room #3313. This is a chance for you to provide industry information about Free File that the working group can consider as it contemplates program improvement opportunities.

Also, the Commissioner has met directly with Mr. Ventry. The Commissioner explained the importance and role of the IRSAC chair position and the importance it plays in providing advice to the IRS, helping ensure the group has a shared and cohesive recommendation from all the participants. It was agreed to update The Hill article to remove the reference to the IRSAC (Mr. Ventry had taken this step prior to the meeting with the Commissioner) and not include that reference in any future articles (Mr. Ventry also took this step). Finally, the IRSAC Co-Chair – not Mr. Ventry -- will lead the future discussions and recommendations for topics related to Free-File. Mr. Ventry will recuse himself from participating or contributing to the topic of Free File.

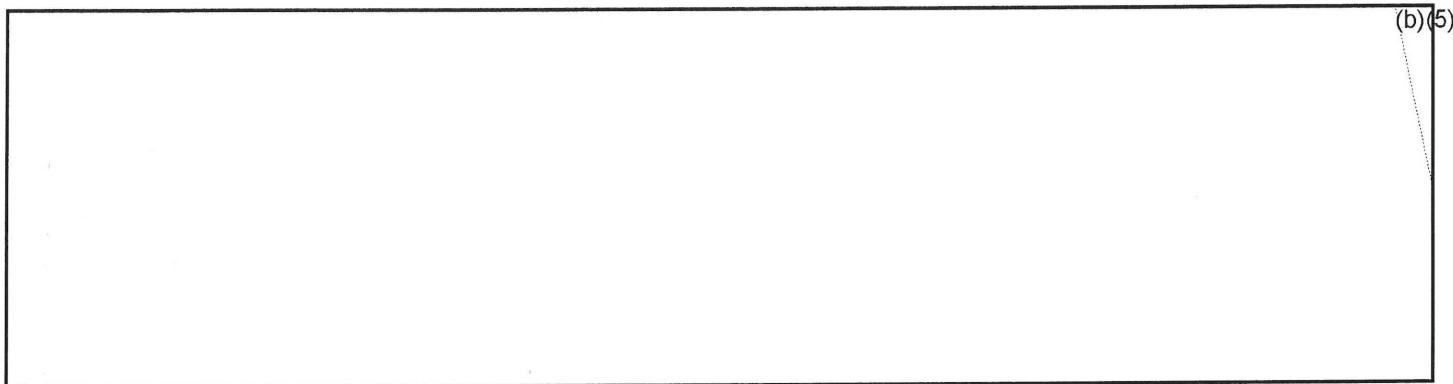
Please let me know if you will be able to attend. Your contact for the meeting on the 25th will be John Lipold. He can be reached that day via his cell 703-655-5090.

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Bond Michelle D

From: Vickie Hull <vickie.hull@timhugo.com>
Sent: Saturday, July 21, 2018 9:29 AM
To: Corbin Kenneth C
Cc: Lemons Terry L; Evans Liz E; Steve Ryan; David Ransom; Vickie Hull
Subject: Fwd: FW: Free File Follow Up. approve please and send or more likely we send.

Ken,



I am pleased pleased to accept IRS's invitation to attend and present on Wednesday. I will need AV equipment to project slides for the presentation.

Also, an incorrect email was used for me (hugo@capnet.org). Please use this email for further communication.

Regards,

Tim

From: Corbin Kenneth C [mailto:Kenneth.C.Corbin@irs.gov]

Sent: Friday, July 20, 2018 10:58 AM

To: Ryan, Stephen; Hugo@capnet.org

Cc: Lemons Terry L; Evans Liz E

Subject: Free File Follow Up

Page: 2

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Please let me know if you will be able to attend. Your contact for the meeting on the 25th will be John Lipold. He can be reached that day via his cell [REDACTED] (b)(6)

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